North Carolina State Bar Board of Legal Specialization
Supplemental Materials for Estate Planning and Probate Law Initial Applicants Only

Name: _____

IV. Substantial Involvement – additional information

A. INVOLVEMENT WITH PLANNING:

1. Approximately how many estate planning clients have you prepared documents for in the last 12 months? _____

2. Approximately how many clients with assets less than $5 million have you prepared estate planning documents for in the last 24 months? _____

3. Approximately how many clients with assets in excess of $5 million have you prepared estate planning documents for in the last 48 months? _____

4. Approximately how many clients have you prepared gift tax returns or provided gift tax advice for during the last 24 months? _____

5. Approximately how many clients have you prepared or advised in regard to trusts for disabled beneficiaries in the last 24 months? _____

6. Approximately how many clients have you prepared or advised regarding charitable giving in the last 48 months? _____

7. Approximately how many clients have you prepared or advised regarding the use of corporate entities or partnership entities in conjunction with estate tax planning in the last 48 months? _____

B. INVOLVEMENT WITH ADMINISTRATION:

1. Approximately how many estate administrations have you worked on in the last 12 months? _____

2. Approximately how many federal estate tax returns have you prepared or reviewed for estates electing portability of the decedents' unused federal estate tax exemption in the last 48 months? _____

3. Approximately how many federal estate tax returns have you prepared or reviewed for estates that are required to file an IRS Form 706 in the past 48 months? _____

4. Approximately how many gift tax returns have you prepared for clients during the last 48 months? _____

5. Approximately how many estate administration settlements or estate litigation matters have you worked on in the last 36 months? _____

C. ADDITIONAL INFORMATION

Please share any additional information regarding your practice that you feel makes you a good candidate for specialization.